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# *Preserving And Promoting The Discipline Of Dermatology: What Can The ILDS Do?*



**2nd ILDS World Skin Summit**  
10-12 June 2018, Ho Chi Minh City, Vietnam

# *Addressing Non-Accredited Skin Health Providers And Promoters*



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# *Summary*

- India's economic growth
- Economic growth of our beauty and wellness industry
- What should we do
  - Educate/inform the consumer / popularize skincare and dermatology through a professional PR agency
  - Educate the non-dermats – design courses in grades for them from basic to advanced
  - Increase the number of postgraduate seats



# *India: the last great untapped opportunity*

12 January 2017

The world's second most populous nation is fast becoming one of the most dynamic consumer markets.

- Emerging economies have fallen out of fashion, as Brazil and Russia struggle with recession and China adjusts to a 'new normal' of slower economic growth.
- Yet in a global economy fraught with uncertainty, India is still booming.
- Over the next decade to 2025, India's GDP and its contribution to world trade will almost triple to 6% and it will become the world's third largest economy.

- **Its population of 1.29bn will grow by 2% a year and annual gross income is expected to double between 2009 and 2030**
- The transformation of the country's consumer economy will be similarly dramatic – consumption has increased more than threefold in the past decade
- Overall consumer spending was US\$0.22tn in the year 2000 but reached US\$1.3tn in 2015. It is expected to grow by seven times in the next 15 years to reach US\$7.3tn in 2030.



- This growth will be driven to a large extent by India's fast-emerging middle class.
- By 2025, 70% of households will be classed as middle income, up from 54% today.
- The consumer economy will be defined by its youth: Around 70% of the population is below the age of 45.

- In the next 10 years among the BRIC markets, India will have the lowest average population age
- The transformation of the country's consumer economy will be similarly dramatic – consumption has increased more than threefold in the past decade.

- According to NSDC [ (*National Skilled Development Corporation*) under the Ministry of Skilled Development & Entrepreneurship ] skilled workforce in beauty and wellness sector would grow thrice as much, from 40 Lakh in 2013 to 1.42 Cr in 2022, making it the fastest growing job creator
- It is expected to grow at a CAGR (*Compound Annual Growth Rate*) of 20%, with 23% in organized and 15% in unorganized segments

- **The beauty and wellness industry in India is booming, with a tremendous potential for growth in 2018**
- **In fact, it is said to be growing twice as fast as markets in the United States and Europe**
- **India is also the second largest consumer market in the world**

- According to a 2016 Assocham (*The Associated Chambers of Commerce & Industry of India*) report, the market size of India's beauty, cosmetic and grooming market will reach \$20 billion by 2025 from the current \$6.5 billion
- Also, a rising aspiration among Indian men to look better groomed has led to this market's rapid growth of more than 42% in the last five years, revealed the report

- The compounded annual growth rate (CAGR) of the beauty & wellness business in India has been around 18 per cent
- This is attributed to:
  - Exposure to global trends
  - Rising disposable income
  - Changing lifestyles
  - Increasing number of women in work force
  - Rise of middle class
  - Growing aspirations of people to live the good life and look good

- Scientific techniques and modern beauty concepts are influencing the business, giving rise to vast varieties of beauty products
- An important challenge for the beauty industry in 2018 will be the need for professionally qualified personnel. Beauty care as a service sector offers great scope for employment and entrepreneurship for women

- In an era of selfies, video calls and photo-based social media, the need to look good is no longer confined to special occasions
- In fact , both men and women, young and old are equally drawn into this momentum of social banter, and consequently, the beauty industry in India is growing in scope and breadth



# *Age No Bar For Beauty Consciousness*

- Children today are reaching puberty as early as 10-12 years, resulting in a beauty-consciousness that's typically associated with adults
- The desire to look attractive is beginning at a much younger age than in previous generations

# *Age No Bar For Beauty Consciousness*

- At the other end of the spectrum, the upper age for the market is extending too
- With the thinking that "30 is the new 20" and "40 is the new 30," grooming is no longer restricted to 18-35 year-old female consumers
- And "anti-ageing" may not be the mantra for the older generation that is striving for an ageless look

# *A KPMG Wellness Sector Report*

- **A KPMG Wellness Sector report projected that the size of India's beauty and wellness market would nearly double to Rs 80,370 Cr by 2017-18 from Rs 41,224 Cr in 2012-13**
- A huge problem faced by the industry is the lack of quality manpower
- The demand supply gap of trained staff is a real challenge

## *Similar Data From*

- Euromonitor
- Mint
- Economic Times
- PWC
- Hindustan Times
- Nielsen

*Beauty And Wellness Segment*

*In India Is More Promising Than US,*

*European Market*

# *Beauty And Wellness Industry*

- Claimed to be about Rs 600 billion
- Likely to hit **Rs1.5 trillion by FY2019-20**
- **The market for dermatology clinics is fragmented, unorganized, with low entry barriers**

## *KPMG – Megacities*

- **The future will be an ever-more urban one too: 38% of Indians will be city dwellers, and there will be 18 megacities by 2025 compared to four in 2014**
- **The demands of these city regions will be immense; Mumbai's GDP alone will rise from \$80bn to around \$380bn by 2025**
- Over the same period, the number of households in the urban economy will increase from 150m to 350m
- But there will be other developments too
- The hitherto binary urban and rural markets will blur into multi-tiered ones of mega regions, urban, semi-urban and rural ones

## *What We Can Do – Step 1*

- There is a tremendous dearth of qualified dermatologists and plastic surgeons
- Currently there are only about 8000 dermatologists and about 1500 plastic surgeons
- India's population of 1.29bn will grow by 2% a year and annual gross income is expected to double between 2009 and 2030



# *What We Can Do – Step 1*

- We need to start a drive to emphasize the health of skin, hair and nails
- HEALTHY SKIN IS A BEAUTIFUL SKIN
- Important to consult a dermatologist to check appropriate products
- Check the degrees of your dermatologists

- Our aim is to protect and promote the health of the skin, hair and nails
- We need to tackle the problem professionally.
- It is extremely important to employ a PR Agency for publicizing skincare
- Today nearly half of our population is aged between 27 and 30

- It is mandatory to utilize social media to its maximum
- We should give certificates to the dermatologists and the plastic surgeons
- Giving of certificates is very important

# THIS IS TO CERTIFY THAT

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**this clinic has authentic, qualified and trained  
dermatologists / plastic surgeons**



- Make a core committee to look after the whole program
- This committee will also make sub-committees for each state as well as to plan educational programs for the non-dermats
- A core committee and then committees for each state



**Is your  
face in the  
right hands?**



**#SAFETYINBEAUTY**

- Involve Pharma and cosmetic companies
- Systematically we give talks to:
  - College students
  - Social groups like Rotary, Lion's etc
  - Ladies' groups like Archana, etc
  - IMC, FICCI

- The market for dermatology clinics is fragmented, unorganized, with low entry barriers
- Hence there are no statistics about the number of clinics manned by qualified dermatologists or plastic surgeons



- **We have clinics that are run by homeopaths, ayurvedic physicians, unani physicians, mere MBBS physicians, beauticians and even some businessmen**
- We continue to hear about horror stories





- **It will be socially, culturally, politically and legally impossible to even try to close down such clinics**
- **Hence we have to emphasize the positive aspect of skin health with qualified doctors**
- **This is the only way to make consumers aware and ask questions so they avoid the non-accredited clinics**

## *Step 2*

- The Govt of India along with our Indian Medical Council (IMC) has proposed to make special programs to educate the non-dermatologists
- Much as we dislike this idea, we have to look at the big picture keeping in mind a population of 1.29 billion with a mere 10 to 12,000 fully qualified doctors
- So let us take the responsibility of educating this group in our speciality

- The IADV L has done an excellent thing by starting a drive telling consumers to check their skin specialist's qualifications
- This has to be done on a war footing
- IADV L and CDSI with the ILDS needs to join in an effort to make an all-India plan
- **We should ask the consumer to look for the certificate given jointly by the accredited prestigious organizations**
- We could take tips from the WHO health plan

# *WHO Framework For Action for Health Promotion*

- Healthy public policies
- Partners and actors for health promotion
- Social marketing
- Mechanisms and infrastructures for health promotion
- Various kinds of mechanisms and infrastructure have proved to be useful and crucial for health promotion.
- Key processes for health promotion
- Strategic Environmental Assessment (SEA)

## *Step 2*

- Keeping the big picture in mind, in view of the acute dearth of fully qualified doctors, we will have to set up short programs to educate the non-dermats
- The programs could be in different grades from basic to advanced
- The certificates will be totally different for these groups – either in size or color
- This has been proposed by our government and our Medical Council as well : so that they can prescribe allopathic medicines
- Much as we all do not like this idea, we have to admit that it is practical
- The IADVIL will take up Dermatology and its associated fields along with the Plastic Surgery Society



## *Step 3*

- Side by side we should increase the postgraduate seats so that there will be more qualified doctors in the long run
- We should introduce shorter 1-year diploma courses as well to be started immediately after the basic MBBS degrees

## *To Summarize – Step 1*

- We could have a core committee to make a long-term plan
- Each state would have its own committee
- We would need a proper PR plan
- If we take this up on a war footing I am sure we would achieve a lot in the next 5 years

## *Step 2*

- Make short educational programs for the non-dermatologists
- Multiple grades starting from basic to advanced
- Each plan will have a separate certificate for eg Basic – can do only microdermabrasion, skin peels, electrocautery, and such minor procedures
- Separate grade for all lasers and devices
- Advanced to include all along with neuromodulators and fillers
- OR we can have courses for only lasers & devices OR neuromodulators and fillers etc

## *Step 3*

- Increase postgraduate seats for degrees as well as for diplomas
- Design shorter diploma courses for 1 year post-MBBS
- Encourage private colleges offering shorter post-MBBS diploma courses
- Separately designed / colored certificates using the ILDS logo for all courses including the ones for non-dermat

- In short, instead of dwelling on the negatives, let us emphasize the positive aspects
- Let us make **HEALTHY SKIN IS BEAUTIFUL SKIN** our mantra and propagate a positive message to our consumers and communities

# *Role of ILDS*

- Allow us to use the ILDS logo for the certificates
- This would popularize the name of ILDS

# *Summary*

- What we should do
  - Educate / inform the consumer / popularize skincare and Dermatology through a professional PR agency
  - Educate the non-dermatologists – design courses in grades for them from basic to advanced
  - Increase the number of postgraduate seats
  - Give certificates by all the Indian organizations



**"The woods are lovely  
dark and deep  
But I have promises  
to keep  
And miles to go before  
I sleep  
And miles to go before  
I sleep"**



***THANK YOU!***

